



FAQ

Infographic: Swiss egg market

March 2021

This document provides answers to frequently asked questions (FAQs) arising in connection with the infographic. The FAQ is divided into the individual information isles of the infographic. To view the answers, please click on any of the questions below.

Laying hen housing systems 3

Why is the blue area shown for free-range smaller than the area for organic? Aren't there many more free-range than organic laying hen farms?..... 3

On what basis are the space requirements specified for the various laying hen housing systems? 3

What additional costs are involved for farmers who produce free range rather than barn eggs?.. 3

In the infographics I do not get any information about the recycling of the old laying hens. What happens to the laying hens after they have been kept on the laying hen farm?..... 3

Layer farms..... 4

Why are all the small buildings (i.e. farms with up to 50 laying hens) shown in grey?..... 4

Inputs..... 4

How is the feed quantity calculated?..... 4

Production 4

When I add up the absolute numbers of eggs, I don't always get the overall total shown (e.g. the various quantities of eggs produced in 2018 add up to 973 m, not the total of 974 m shown on the sign). Is this an error? 4

How are the production figures determined? Do they have to be reported by each farm, or are estimates used? 4

Why can the eggs in the grey-coloured column not be unequivocally classified? 5

Distribution 5

How is the proportion of direct marketing determined, and what is meant by direct marketing?.. 5

Where does the data on imports come from? 5



Processing and trade 5

How are egg quantities calculated at the processing and trade level? 5

Barn eggs account for less than 20% of Swiss egg production (collection centre survey, excluding imports). At the same time, they account for almost 50% of all retail sales of Swiss eggs (Nielsen analysis). Why is this? 5

The production graphic (blue column) shows that around 165 m more eggs unequivocally classifiable as free-range are produced than are sold at retail. Can we therefore conclude that these 165 m eggs are downgraded to barn eggs as they pass through the value chain? 6

Annual consumption 6

How are the big differences in per capita consumption between Switzerland and Germany or Austria to be explained? Are they due to higher prices or to differences in calculation models? .. 6

Price per egg..... 6

Why do egg producers receive virtually the same price for barn and free range eggs? 6

Why are prices for imported eggs higher at wholesale for the catering trade than at retail? Shouldn't they be lower, as larger quantities tend to be purchased at one time?..... 7

Why are no distribution-level prices shown in the graphic?..... 7

NOTES ON THE TARGET AUDIENCE

This infographic is addressed to a broad target audience, including in particular:

- experts from the agriculture and food sectors;
- journalists working for trade and non-trade publications;
- representatives of research and education;
- policymakers and representatives of authorities;
- other interested parties.

While the infographic offers a rapid overview of the Swiss egg market, it involves a degree of complexity. To provide a leaner account of the Swiss egg market, a separate market report (in German) has been compiled, including the key figures. This report is available at: www.marktbeobachtung.admin.ch.



Laying hen housing systems

Why is the blue area shown for free-range smaller than the area for organic? Aren't there many more free-range than organic laying hen farms?

The coloured areas indicate the specified minimum (indoor and outdoor) areas that must be provided, on average, for a laying hen in a farm of a given type. An organically kept laying hen has 5 m² pasture area available, while a free-range laying hen has 2.5 m². No outdoor area is available for a barn-kept laying hen. The green and blue areas thus represent, proportionally, the amount of pasture available per laying hen. More space is also provided in the barn and winter garden for an organic than for a free-range laying hen

On what basis are the space requirements specified for the various laying hen housing systems?

The requirements for barn-kept and free-range laying hens are specified in the federal animal welfare programme BTS (winter garden and barn area) and in sectoral agreements (barn and pasture area). The space requirements for organically kept laying hens are specified in the Organic Farming Ordinance and in the Bio Suisse Guidelines.

What additional costs are involved for farmers who produce free range rather than barn eggs?

Additional costs arise as a result of the more stringent production requirements, particularly regarding the housing of laying hens. No state-prescribed marketing standards exist in Switzerland for barn or free-range egg production methods.

However, on the Swiss egg market, eggs are generally marketed as barn eggs if the producers not only comply with animal welfare legislation but

also fulfil the requirements for particularly animal-friendly housing systems (BTS) specified in the Direct Payments Ordinance (DPO, SR 910.13). Eggs are generally regarded as free-range if they come from producers not only complying with animal welfare legislation but also fulfilling the requirements for regular access to outdoor areas (RAUS) specified in the DPO.

In the infographics I do not get any information about the recycling of the old laying hens. What happens to the laying hens after they have been kept on the laying hen farm?

The focus of the infographic egg market is on the egg and the means of production for egg production. This is why the topic of recycling laying hens is not included in the information graphic. Laying hens are utilised in various ways after they have been reared on the farm. Some is converted into energy in biogas plants, while some flows into the meat sector (soup chicken or processed meat). In the private sector, the aim is to promote the consumption of spent laying hens. Further information on this is available at <https://www.gallocircle.ch>.

Legislation:

- Animal Welfare Act and Animal Welfare Ordinance (SR 455 and SR 455.1)
- Ordinance on Direct Payments to Agriculture (SR 910.13): <https://www.admin.ch/opc/de/classified-compilation/20130216/index.html>
- Ordinance on Organic Farming and the Labelling of Organically Produced Products and Foodstuffs (Organic Farming Ordinance, SR 910.18) <https://www.admin.ch/opc/en/classified-compilation/19970385/index.html>
- EAER Ordinance on Organic Farming (SR 910.181). Detailed provisions on livestock (including poultry) production are given in Annex 5 (Art. 4a para. 1).



<https://www.admin.ch/opc/en/classified-compilation/19970387/index.html>

Guidelines:

- Bio Suisse Guidelines: Section 5.5.3 Laying hens (p.135 ff.)
<https://www.bio-suisse.ch/de/richtlinienweisungen.php>
- Comparison of Organic Farming Ordinance and Bio Suisse Guidelines for livestock production:
<https://shop.fibl.org/chde/mwdownloads/download/link/id/117/>
- Coop Guidelines for Naturafarm eggs
<https://www.coop.ch/content/naturafarm/de/standards.html>
- Migros: Laying hen housing systems
<https://www.migros.ch/de/services/inhalte-herkunft/eier/haltung.html>

Layer farms

Why are all the small buildings (i.e. farms with up to 50 laying hens) shown in grey?

The structural data is based on the agricultural structure survey of the federal agricultural policy information system (AGIS). The various housing systems were determined on the basis of the farms' participation in the federal animal welfare programmes (BTS, RAUS) and declared compliance with organic production standards. Farms with small poultry flocks (up to 50 animals) frequently decide not to participate in the federal animal welfare programmes, even though in most cases the relevant requirements would largely be fulfilled. This may be due to a desire to avoid the administrative effort required for a small number of animals. For small flocks of laying hens, classification by housing system would thus be inaccurate. As these farms cannot be assigned to a particular system, the buildings are shown in grey.

Inputs

How is the feed quantity calculated?

The feed quantity is determined by multiplying the estimated feed requirements of a laying hen for the production of an egg by the total number of eggs produced (sector data). Because of the differing feed composition, a distinction is made between organic (154 g/egg) and non-organic laying hens (135 g/egg).

The reported feed quantity of 128,000 tonnes relates exclusively to egg production in the narrow sense – in other words, the feed required for the rearing of chicks and pullets is not taken into account.

Production

When I add up the absolute numbers of eggs, I don't always get the overall total shown (e.g. the various quantities of eggs produced in 2018 add up to 973 m, not the total of 974 m shown on the sign). Is this an error?

The figures used in the infographic were rounded for ease of presentation. For this reason, the totals may differ slightly from the sum of the individual figures. Percentages were rounded so as always to add up to 100%.

Data without rounding errors can be viewed and processed in the [structured Excel file](#).

How are the production figures determined? Do they have to be reported by each farm, or are estimates used?

The production figures are determined by Aviforum (Swiss poultry industry competence centre) using the so-called "chick statistics". Egg production is estimated on the basis of the number of hatched female chicks (data supplied by hatcheries). The production-specific parameters (e.g. loss rates) used for estimates are regularly reviewed and, if necessary, adjusted. This production data is combined by the FOAG Market



Analysis Unit with a quantitative survey of national egg dealers (collection centres) to allow more reliable conclusions to be drawn concerning the various types of egg production (barn, organic, etc.).

Why can the eggs in the grey-coloured column not be unequivocally classified?

Production data comes from the Aviforum chick statistics and the FOAG egg dealer survey. For the production estimates, data from these two sources is combined.

Total domestic production (974 m eggs) and total organic production (169 m) are determined from the chick statistics. The data on barn (BH: 96 m) and free range eggs (FR: 379 m) comes from the survey of national collection centres, which in 2018 covered around 65% of total Swiss egg production.

The remaining category (329 m) is thus determined by subtracting the quantities of organic, free-range and barn eggs from the overall total. This method has to be adopted because, from the chick statistics, it can only be determined whether chicks are reared for organic or non-organic production. Eggs in the remaining (non-organic) category are therefore not unequivocally classifiable as barn or free range.

Distribution

How is the proportion of direct marketing determined, and what is meant by direct marketing?

The quantities classified at the distribution level under "Regional collection and direct marketing" are calculated on the basis of total production (determined from chick statistics) and the survey of national egg dealers (collection centres), which in 2018 covered around 65% of total Swiss egg production. The remaining category thus comprises regional collection, processing and direct marketing.

Direct marketing refers to products sold directly by the producer to the final consumer. The exact quantities sold to final consumers via direct marketing cannot be reported.

Where does the data on imports come from?

In the Federal Customs Administration statistics, egg imports are reported separately under the headings of "eggs for consumption and processing" and "egg products" (in kilograms), which are converted to shell egg equivalents to determine the total number of eggs.

Processing and trade

How are egg quantities calculated at the processing and trade level?

Swiss retail sales figures for shell eggs are calculated on the basis of data from Nielsen Switzerland as well as surveys carried out by the FOAG Market Analysis Unit. Swiss processed egg quantities are based on an estimate by Aviforum in consultation with representatives of the Swiss egg industry. In the case of imports, eggs for processing and egg products are reported separately in the Federal Customs Administration statistics. These quantities are summed to obtain the total number of processed eggs. The remaining eggs are assigned to the "regional and wholesale" category.

Barn eggs account for less than 20% of Swiss egg production (collection centre survey, excluding imports). At the same time, they account for almost 50% of all retail sales of Swiss eggs (Nielsen analysis). Why is this?

The proportion of barn-laid shell eggs is higher in the retail trade than in production. The converse is true for the proportion of free-range shell eggs.

Retail market experts estimate that some eggs from free-range production (excluding organic)



are downgraded to barn eggs at retail. This downgrading is primarily designed to stabilise the market and serves to adapt supply to demand (e.g. to mitigate the oversupply of free-range eggs after Easter). Downgrading is part of annual volume planning within the egg industry and is in no way connected with federal market relief measures.

The production graphic (blue column) shows that around 165 m more eggs unequivocally classifiable as free-range are produced than are sold at retail. Can we therefore conclude that these 165 m eggs are downgraded to barn eggs as they pass through the value chain?

Because of gaps in the available data, the number of eggs downgraded cannot be precisely estimated. Around 33% of all eggs produced in Switzerland cannot be unequivocally classified (cf. the quantities of eggs in the grey columns in the value chain). Therefore, eggs unequivocally classifiable as free-range (FR), of which higher quantities are produced (379 m) than are sold at retail (214 m), may not necessarily have been degraded, but have ended up in the residual category FR/BH, e.g. as eggs for processing for the manufacture of egg products for the food industry (where the precise proportion of free-range eggs is not known); conversely, barn eggs from the indeterminate residual category FR/BH at the production level may have passed into the BH category at the retail level.

In other words, the ratio of barn to free-range in the FR/BH category may change along the value chain. For this reason, it is not possible to draw definitive conclusions about the quantities of degraded eggs. Further information on data collection methods can be found on p. 4 of the FAQs.

Annual consumption

How are the big differences in per capita consumption between Switzerland and Germany or Austria to be explained? Are they due to higher prices or to differences in calculation models?

No conclusive explanation can be provided here. According to experts, differences in consumer behaviour (in particular, breakfast and baking habits) are essentially responsible for the clear difference of around 50 eggs per capita. By contrast, price has little influence on the quantity of eggs consumed. Firstly, as prices for shell eggs in Switzerland range from under 20 to over 100 centimes per egg, price-sensitive households can also purchase inexpensive (e.g. imported or barn) eggs. In addition, eggs are affordable compared to other animal products (e.g. meat or dairy products).

At the same time, methodological questions need to be taken into consideration in interpreting the consumption data:

- In the per capita consumption statistics for Switzerland, eggs in imported processed products (egg noodles, baked goods, etc.) are not taken into account.
- Swiss population estimates include not only the resident population but also tourists (based on overnight stays) and cross-border commuters; as a result, the total quantity of eggs available is distributed among a larger number of people.
- Cross-border shopping (eggs imported from abroad) is not covered by the statistics.

Price per egg

Why do egg producers receive virtually the same price for barn and free range eggs?

The production costs for free-range eggs are normally higher than for barn eggs. Some of the additional costs are offset through participation



in the federal animal welfare programme RAUS (regular access to outdoor areas; mandatory for producers of free-range eggs); for this reason, the prices paid to egg producers are virtually the same for barn and for free-range eggs.

Why are prices for imported eggs higher at wholesale for the catering trade than at retail? Shouldn't they be lower, as larger quantities tend to be purchased at one time?

The imported eggs sold at retail are almost exclusively small and thus light (e.g. 48 g per egg). In contrast, imported eggs sold at wholesale to the catering trade are mainly of higher unit

weight (60 g+), as these are more suitable than smaller eggs particularly for the breakfast trade (e.g. breakfast eggs for guests). Larger eggs are more expensive, which explains why the average price for imported eggs is higher at wholesale than at retail.

Egg size is not, however, taken into account in the calculation of average egg prices, i.e. the average egg price is a unit price, not a price by weight.

Why are no distribution-level prices shown in the graphic?

Distribution-level prices are not given, as these are sensitive business data.

CONTACT & PUBLICATIONS

Market Analysis Unit
Schwarzenburgstrasse 165, CH-3003 Bern
marktanalysen@blw.admin.ch
www.marktbeobachtung.admin.ch

The retail sector infographic is available [here](#).

[Order form for subscribers:](#)

[Online order form](#)

For information on limitation of liability, data protection, copyright, etc. see:

www.disclaimer.admin.ch

Concept & design:

YAAAY; FOAG, Market Analysis Unit